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One Cataloger's Action-Packed Adventures with Alma Migration

By Erin Grant

I have a bit of a unique migration experience, as I began participating in a migration from Voyager to Alma at Georgia Tech in the fall of 2015, moved to Emory University in October, and then immediately jumped into participating in a concurrent migration from Aleph to Alma that was already underway at Emory. Essentially, I experienced the beginning-to-middle of one migration at Tech and then the middle-to-end of another at Emory. When people ask me what that experience was like, I like to compare it to leaping from the roof of one high-speed train onto the roof of another high-speed train, because apparently I like to think that library work (or at least a migration) is as exciting and as potentially fraught with peril as a James Bond film. Although I may not have attained the most complete picture of a singular institutional migration from start to finish, in exchange I feel that I have benefitted from a wider perspective gained from being at two different institutions dealing with essentially the same migration. However, despite my assurances that it is “currently in the mail,” I have yet to receive my bulletproof cardigan from Q to prepare me for future death-defying library assignments.

My only experience with migrations before last year was as a mere spectator at my first library job at the Art Institute of Atlanta, where we migrated from Athena, a Windows-based integrated library system (ILS) that was developed in the mid-1990s, to Voyager. As I had not yet discovered my secret inner identity as a cataloger and was working as a reference librarian at the time, I had very little to do with that migration. Our library director, who was adept at cataloging and technical services, carried out our migration largely on her own. Although she successfully handled the migration with aplomb, it certainly did not seem to be a joyful undertaking by any means, if

based purely on her pained facial expressions. I have since learned firsthand that migrations are indeed arduous from a cataloging/tech services perspective, and that migration-related anguished grimacing is a nearly unavoidable occurrence. Similar facial expressions of distress that are likely to ensue are why the rest of the library might find it prudent to avoid cheerfully asking tech services staff “So, how’s the migration going?” unless you’re also bearing large quantities of candy in an attempt to soothe our tortured souls.

Due to the complex consortial and institutional relationships at Georgia Tech, for many months before we actually began, a migration to Alma was something that we knew we would be involved in, but not necessarily exactly when. The library, including tech services, was also involved in several other simultaneous projects, most notably detailed and labor-intensive activities related to surveying and moving the bulk of the physical collection to the Library Service Center (LSC), a state-of-the-art off-site facility being constructed and to be shared with Emory, as well as projects related to the redesign of the main Tech library. Because of these competing high-priority projects, it was difficult for us in cataloging and tech services to prioritize pre-migration tasks without an exact date for migration. We knew we should ideally undertake an extensive bibliographic database cleanup for an optimal migration, but simply did not have the bandwidth to make this happen.

To coincide as closely as possible with Emory’s Alma December 16, 2015 go-live date and enable joint institutional patron access to the materials being moved to the Library Service Center, August 14, 2015 was Tech’s official Alma implementation kick-off, with a go-live date of December 28, 2015. Since Ex Libris generally allots a full six months for Alma

implementation, at four and a half months, Tech's migration had an aggressive timeline. As migration preparation began to ramp up, we continued the high-level conversations with Emory, the University System of Georgia (USG), and Ex Libris that had begun earlier in the year regarding possible topologies for our Alma and Primo instances, in order to maximize integration with both Emory (particularly for the LSC) and the rest of the USG libraries.

Tech's internal migration work began in earnest and at what seemed like lightning speed after our official implementation kick-off in mid-August. Since Emory's implementation planning and preparation had begun much earlier in September of 2014, we took cues from their migration administrative structure by establishing a core group and several working groups called Functional Area Working Groups (FAWGs). Each of Tech's FAWGs was comprised of a lean team of a few staff members representing key personnel who could best advise and guide migration preparation and activities in that area. The key person for each FAWG was also a part of the Core Group, which met weekly to coordinate activities and also for a weekly call with our migration team from Ex Libris. We ended up with thirteen FAWGs: Fulfillment & ILL, Admin & Integrations, Acquisitions, Metadata, Data Cleanup, eResource Management, Discovery & Primo, Printing, User Management, Analytics & USTAT, Operational Reporting, LSC Integrations, and Training & Communication. Since about eighteen people were FAWG members, many staff were involved in multiple FAWGs; for instance, as cataloging unit head, I was involved in the Metadata, Data Cleanup, and eResources FAWGs, and was also part of the Core Group.

All of the staff involved in migration were also added as members to Basecamp, an online platform for managing implementation work and interacting with our Ex Libris migration team. Internally, we took advantage of project management software called Workfront to keep track of tasks, and Sharepoint to work

collaboratively on documents and spreadsheets.

The number of meetings related to Alma migration suddenly multiplied on the calendars of everyone involved in the project at a furious rate, prompting any and all work that was not Alma-related or absolutely burning-down-the-library-level critical to get pushed to the backburner. Very long days, along with some late night and weekend work, started to become the norm as we raced to complete the configuration and migration forms that Ex Libris needed to perform our initial data load.

One of the early migration hurdles I was involved in at Tech was to separate all of our bibliographic records into print and electronic for Ex Libris before the initial data load, since Alma handles print and electronic inventory very differently. Like many other libraries, we still had a significant number of records representing both print and electronic resources, as well as the usual cataloging inconsistencies and multiple locations for e-resources, which made this a complex and time-consuming endeavor. Amid a late night of work necessitating an emergency burger run to McDonald's, a colleague and I rushed to complete a series of complicated Access reports to identify groups of print and electronic resources. Over the next few days, two other colleagues put in similarly long hours to help separate the print from electronic records on those reports and submit them to Ex Libris.

Sometime during these early official migration days, a bit stressed-out and sleep-deprived, Tech staff involved in migration started calling ourselves the A-Team after the 1980s TV show, and began sharing memes featuring B.A. and Hannibal. Although it might have seemed like a somewhat silly response, this helped us blow off steam, maintain a sense of humor about completing a difficult task very quickly, and feel more united as a group. One of the most valuable pieces of advice I've heard at the ELUNA conference still remains "remember to

treat each other kindly during migration,” as it is extremely stressful on everyone involved and tensions can obviously run high. Maintaining an upbeat attitude and sense of humor and coming together as a group helped us to remember to treat each other kindly during our migration.

Around this same time, we also had conversations with Ex Libris about the amount of database cleanup that we could reasonably take on before our initial and final data loads. Our migration team from Ex Libris was very helpful in prioritizing what cleanup tasks were essential and possible, given our particular situation. Unfortunately, the compressed timeline of our migration meant that little pre-migration data cleanup was realistically achievable, which was very disappointing to me. Out of a list of twenty-three possible bibliographic database cleanup tasks I identified using Ex Libris documentation, ELUNA presentations, Alma-L and Voyager-L posts, and familiarity with our bibliographic data, we were only able to take on and complete four cleanup tasks before our initial data load. We used Access reports, Voyager's Global Data Change module, Gary Strawn's excellent Voyager batch change programs, and the help of hardworking staff and student workers to correct the necessary records. It was certainly not the amount of data cleanup I wished I could have done, but we gave it our all so as to at least hit the most critical tasks and wrestle our data into the best shape we could in the short time we had.

Almost before I had time to exhale and draw another breath, it was the end of September and my last day at Georgia Tech. As part of our weekly migration calls with Ex Libris, the Core Group was individually assigned functional Alma tasks to practice and then demonstrate in each meeting to indicate our learning of the new system. One of the last tasks I completed before departing Tech for Emory was to demonstrate importing a record and creating inventory for it in our Alma sandbox during my last weekly call as part of Tech's migration. With bittersweet

thoughts, and after a much-needed week of vacation, I then jumped head first into Emory's Alma migration in October 2015.

Whereas Tech's migration team was a very lean group operating at a breakneck pace, Emory's team was about twice the size of Tech's and seemed a bit less harried, since their preparations for this migration had begun in the fall of 2014. There was an official project manager from Emory's Project Management Office that kept the migration work on track to meet deadlines, track risks and issues that arose, and guard against scope creep. A steering group made administrative decisions and reported to the Library Cabinet and university librarian. Our technical lead was instrumental in coordinating work by advising the project manager, Steering and Core groups, and others. Emory had five FAWGs: Metadata, Fulfilment, eResources, Acquisitions, and Admin-Integrations, each with a lead and co-lead, plus five to six additional members representing different Emory libraries. FAWG leads and Steering Group members made up the Core Group, which met weekly both internally and in calls with our Ex Libris migration team.

Emory and Tech both shared the same Ex Libris migration team, so I had prior experience working with Claudia, Chen, and Carolyn while at Tech, although unfortunately I missed meeting them in person during their on-site visits to both campuses. Overall, I found that Emory's large and well-organized implementation groups were able to draw on deep staff expertise from all of our libraries, while also providing a substantial force to devote to migration activities. Despite these advantages, it was initially difficult for me to adjust to working within a larger and more organizationally complex institutional structure and to become accustomed to the more measured pace and nuances necessary to steer any course of change for this size and scope of library. Nevertheless, I quickly became immersed in Emory's Alma implementation by

participating in the Metadata FAWG, Core Group, weekly Ex Libris calls, and our Basecamp migration instance.

A recent migration from Sirsi to Aleph in 2011 fortunately meant that Emory's data was largely clean enough to withstand another migration without herculean amounts of cleanup. In addition, the members of Emory Libraries Cataloging and Authority Control Working Group (CATAWG) had also previously identified and completed Alma-specific bibliographic cleanup projects. This changed the direction of my work on Emory's migration from the database cleanup that I had been engaged with at Tech to other implementation activities like assisting with Alma staff training, testing and changing Alma configurations associated with metadata, preparing for a cataloging/tech services freeze, and establishing new cataloging workflows.

Occurring in October and November 2015, staff Alma training was one of the first migration activities I participated in at Emory. Each FAWG was responsible for preparing and conducting training related to our specific areas. As training sessions were planned by the FAWGs, they were all gathered on a collaborative spreadsheet, organized by date, and shared with library staff to ensure that everyone could attend the training they needed. The Metadata FAWG developed three training sessions: Searching & Navigating, Metadata I (Copy Cataloging, Inventory, and the Metadata Editor), and Metadata II (Advanced Cataloging Functions). To develop our training sessions, we consulted existing Ex Libris Alma training materials as well as training documentation that University of Minnesota and University of Wisconsin had shared with us. We also assigned prerequisite Ex Libris training videos for staff to watch before they attended our sessions. Since we are a large library, we created Google Forms to anticipate the number of participants for each training session and help keep us organized. Over two weeks, an MFAWG colleague and I taught eight sessions of

Searching & Navigating, a one-hour session that acted much like an Alma 101 primer and included hands-on activities, to ninety-five staff members.

During November and December (and even after go-live into January), much of my time was next spent setting up Alma configurations related to metadata. This included setting up user profiles for my employees and student workers, tweaking metadata configurations, setting up normalization and merge rules, and wrapping my head around our technical services work order set-up and workflow. Others in the Metadata FAWG were involved in the same activities, so luckily we were able to build on our collective knowledge and spread some of this tricky and time-consuming work around.

As the end of November 2015 began to loom before us, project participants developed a timeline and strategy for dealing with the necessary three week technical services freeze to enable our final data load, testing, and migration. This required a coordinated effort between acquisitions, cataloging, circulation, and library core services to create a cohesive chart detailing the different activities being frozen and their start and end dates, which was then communicated to all staff. With the help of MFAWG colleagues, I developed a strategy for cataloging during the tech services freeze and distributed a how-to document to all catalogers. Catalogers in my unit spent the time during the tech services freeze cataloging offline in OCLC so as not to accrue an unwieldy backlog, installing and setting up SpineOMatic on their computers for printing marking slips and labels, and continuing to train in our Alma Sandbox.

During the same time as the technical services freeze, Emory's Alma project technical lead and our Ex Libris migration team carried out our cutover plan from Aleph to Alma, which included forty-two separate tasks. On December 14, 2015 we asked as many library staff as possible to test our Alma data, after

which we officially signed off on our migrated Alma data with Ex Libris. On December 16, 2015 library staff conducted Primo testing before signing off to accept our migrated Primo data, and with that, we were officially live with Alma and our new Primo instance.

My work on Emory's Alma implementation as a new employee felt so all-consuming that it resulted in a kind of tunnel vision for me until after our actual go-live date, after which it seemed like I finally awoke from the fever dream of migration to take on some of my other duties. Despite our preparations for avoiding a large cataloging backlog, we did still end up with a post-migration backlog that had to be dealt with, but everyone in my unit pitched in to plow through it quickly. Establishing new cataloging workflows, particularly for many of the records we get from vendors, ultimately had to wait until after go-live. Similarly, adjusting how we handle issues like withdrawals, rush cataloging, and authority control in Alma also had to wait until migration was complete. Work on streamlining these processes continued through the spring and summer of 2016, with necessary adjustments to some workflows still being made to this day.

The need for documenting and sharing these and other Alma procedures between multiple,

dispersed Emory libraries has provided an opportunity to begin developing a collaborative online documentation repository using ScreenSteps software. Being able to quickly and easily create how-to guides for new processes and then instantly share them with colleagues has helped us teach each other and adjust to working with a new system.

There have certainly continued to be challenges for us in adapting to a new system, but I think we are all grateful that the most difficult and daunting work of migration is now behind us. We successfully survived our migration, and are now looking forward to taking advantage of a more sophisticated next-gen library system to improve and streamline our technical services work. Personally, I am very relieved that I did not fall into the abyss while jumping from one high-speed train to another during my first migration, and I will proudly sport my bulletproof James Bond library cardigan as soon as it finally makes its way to me. In the meantime, please feel free to bring some candy to me and any tech services person you come across that is involved in migration, because chances are that we need it.

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Emory University*